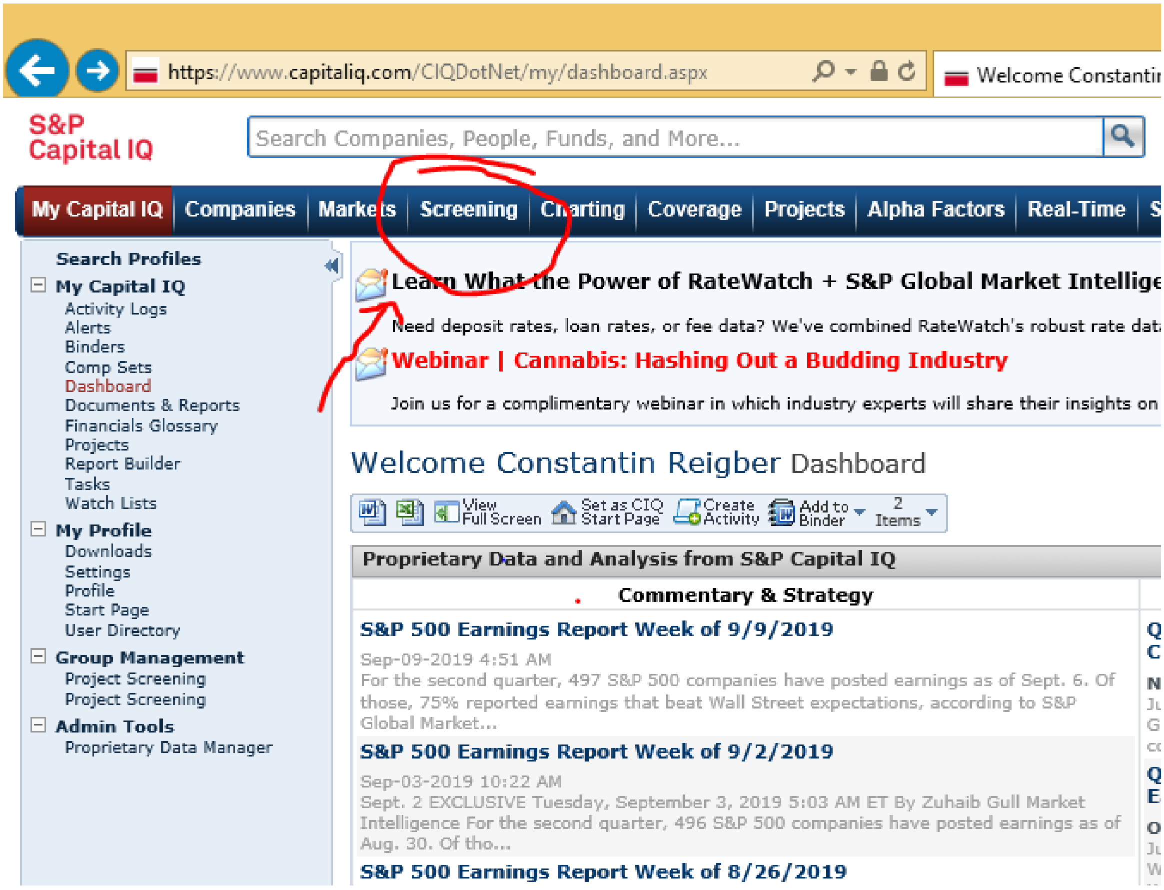
Capital IQ – How to?

How to download Data using the Capital IQ website?

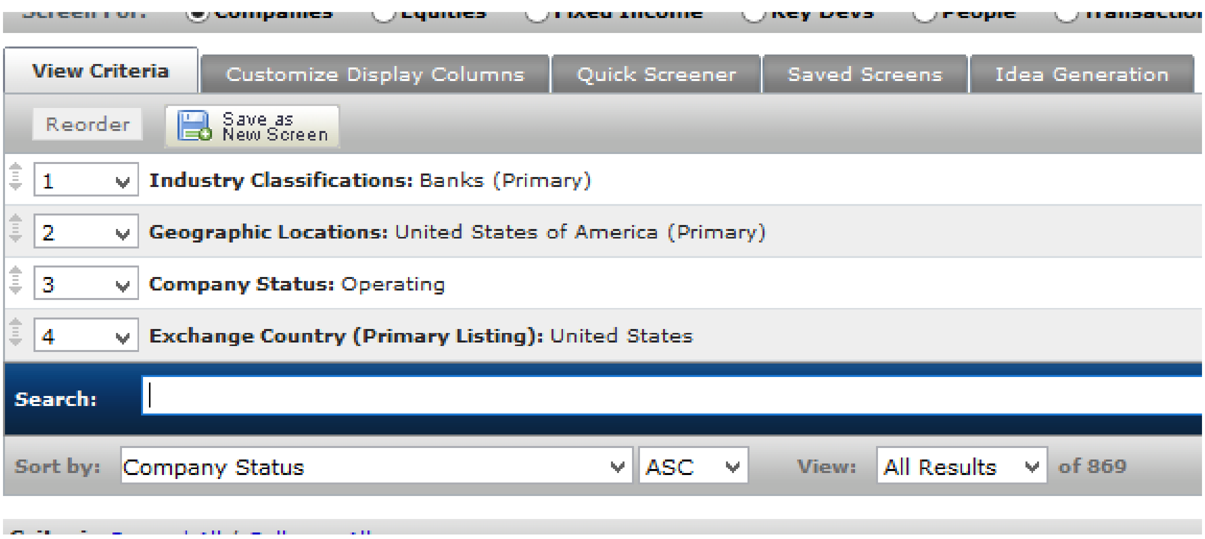
Introduction: In this example, I want to download firm data. My dataset consists of US firms in the banking sector and should include the following information: Company Name, Senior Debt, Total Debt, Total Assets for the Sample period 2000Q1 – 2005Q4 quarterly by fiscal year.

1. In order to download data, click on “Screening”.

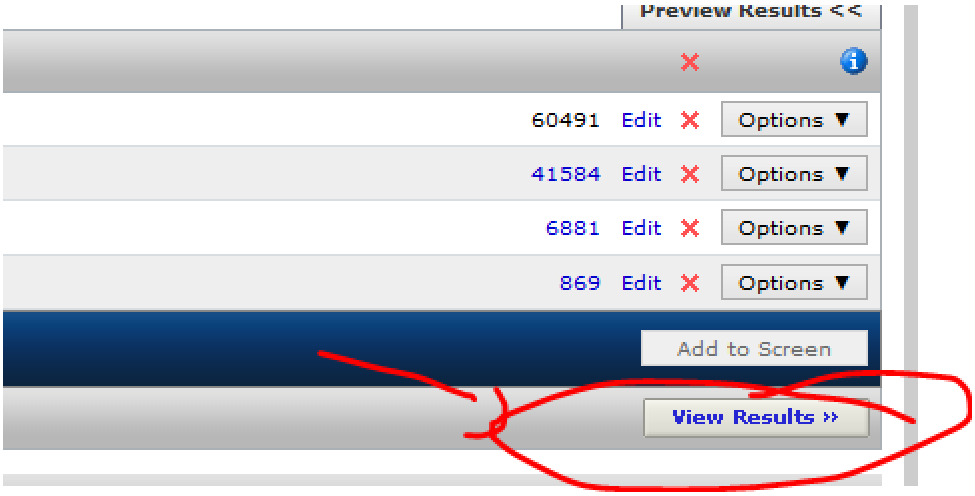


2. Now you can choose from the different categories of data. (hint: move the mouse over the category to see a short description). As we want firm data we choose “Company Screening”.

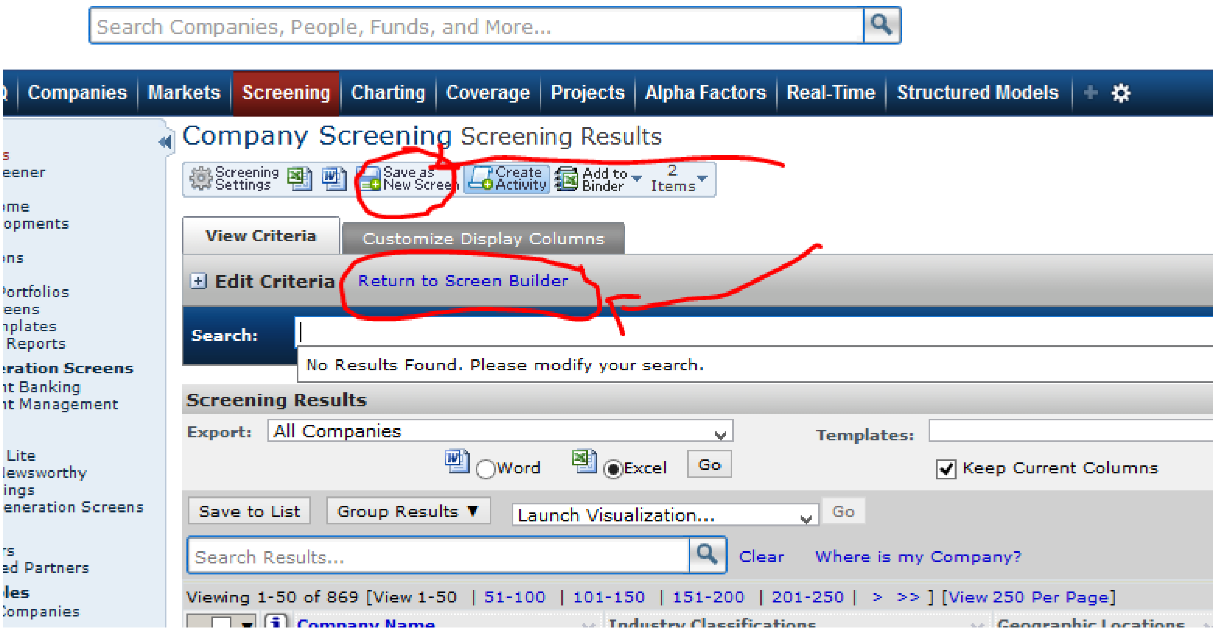
3. The first thing we have to do is specify a list of companies. To do so you can filter all the available companies by the criteria listed on the page. More precise you have to select a specific criterion and click on "Add Criteria". By adding a criterion, you restrict all the available data in your category to the observations, which fulfill this specific set of criteria. In my example, I only have to filter for the "Industry Classifications" and the "Geographic Locations":



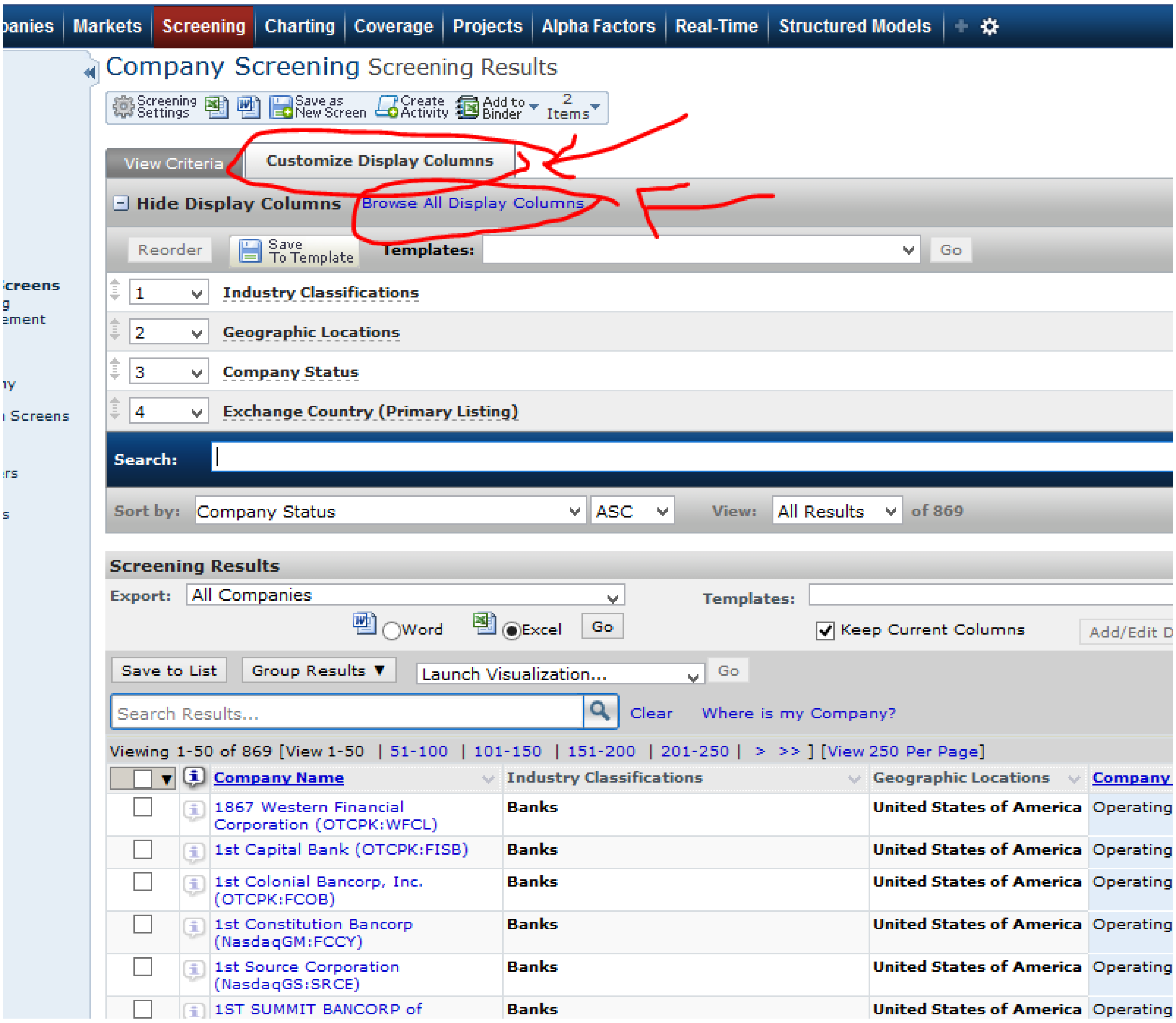
4. After selecting all the criteria you want, click on “View Results” on the right hand side to preview your data set and further customize it.



5. If you are not happy with your results, you can go back to the criteria selection by clicking on “Return to Screen Builder”. Furthermore, you can also save your search query by clicking on “Save as New Screen”.



6. If you are happy with the firms in your data set than you can proceed and add more columns to your data set with information like total debt. To do so you have to click on “Customize Display Columns” and then on “Browse All Display Columns”.



panies | Markets | Screening | Charting | Coverage | Projects | Alpha Factors | Real-Time | Structured Models
Company Screening Screening Results
Screening Settings
Save as New Screen
Create Activity
Add to Binder
2 Items
View Criteria
Customize Display Columns
Hide Display Columns
Browse All Display Columns
Reorder
Save To Template
Templates:
Go
1 Industry Classifications
2 Geographic Locations
3 Company Status
4 Exchange Country (Primary Listing)
Search:
Sort by: Company Status ASC
View: All Results of 869
Screening Results
Export: All Companies
Templates:
Word
Excel
Go
Keep Current Columns
Add/Edit D
Save to List
Group Results
Launch Visualization...
Go
Search Results...
Clear
Where is my Company?
Viewing 1-50 of 869 [View 1-50 | 51-100 | 101-150 | 151-200 | 201-250 | > >>] [View 250 Per Page]
Company Name
Industry Classifications
Geographic Locations
Company
1867 Western Financial Corporation (OTCPK:WFCL)
Banks
United States of America
Operating
1st Capital Bank (OTCPK:FISB)
Banks
United States of America
Operating
1st Colonial Bancorp, Inc. (OTCPK:FCOB)
Banks
United States of America
Operating
1st Constitution Bancorp (NasdaqGM:FCCY)
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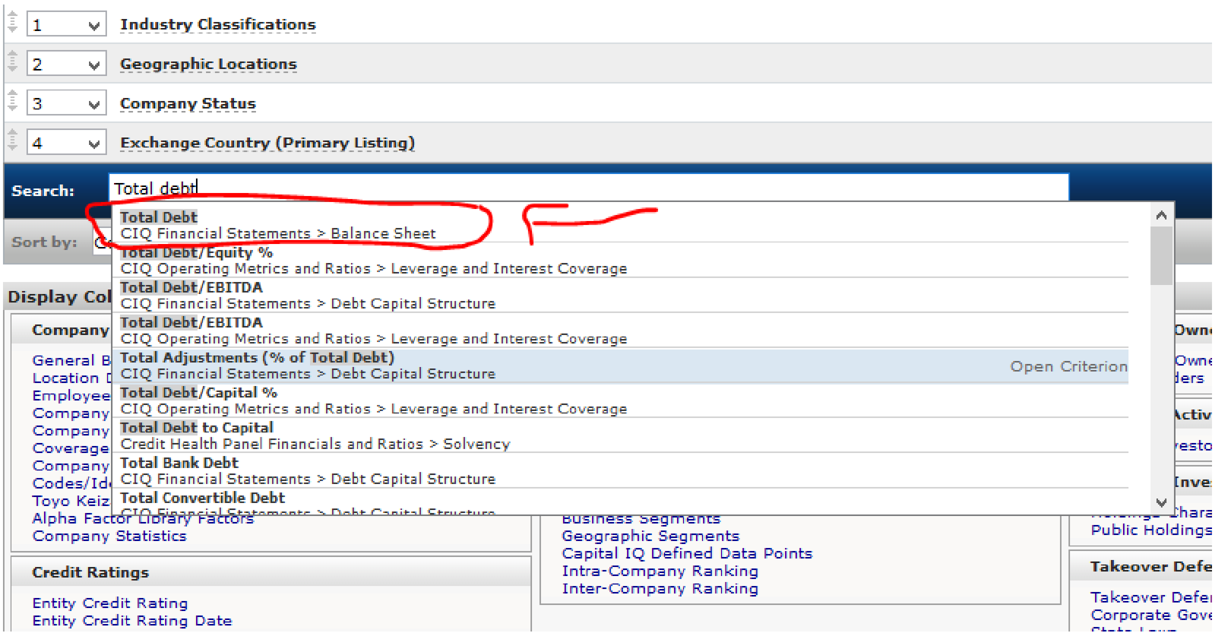
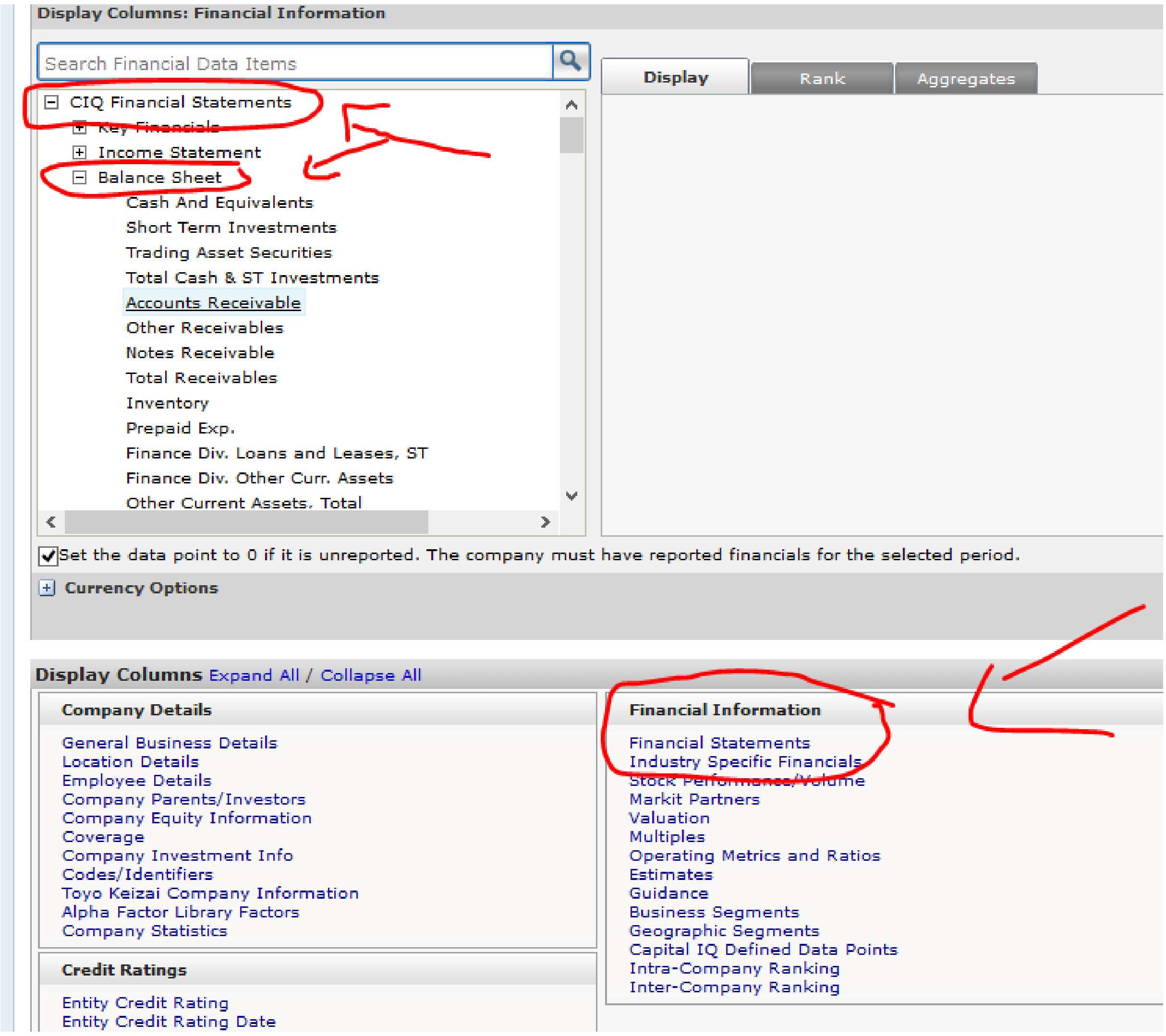
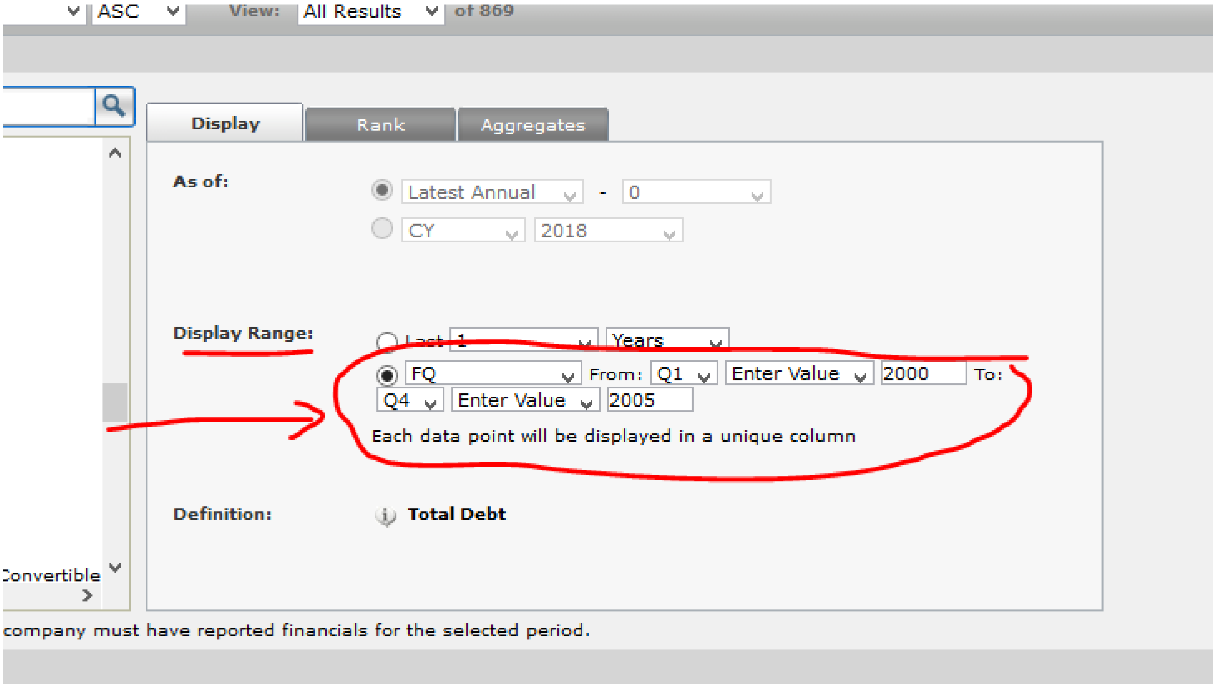
7. In my example, I would now use the text search to find my variables. For beginners it might not be the best idea to directly choose from the recommended variables, because than you have to select all options in the text field and furthermore have no definition of the variable. To avoid this take a closer look at the recommended variables. Choose the one that seems to be the most appropriate one for your purposes and memorize the path. For the variable “Total Debt” the first search results seems to be the best. Hence, I memorize “CIQ Financial Statements > Balance Sheet”.



8. Now I manually search for the variable by using the different categories below the text search. Thus, I click on Financial Statements under the category Financial Information and search for “Balance Sheet” data under the category “CIQ Financial Statements”.



9. After I found my variable “Total Debt”, I can choose the time periods for which I want the data. In my example, I click on the second circle under “Display Range” and choose “FQ; Q1 2000 and Q4 2005”.



10. Now I can add the variable to my data set by clicking on “Add Columns” on the right hand side.

11. After adding all my variables, I click on “View Results”. As before you can save the screen or return to the screen builder

to add further things. In my case, I just want to export the data set to excel. Thus, I click on the circle next to the excel symbol and thereafter on “Go”. You may have to download several files as there is a limit to the number of firms in you can download each time.